

**Operational Guidance 13-2024 – Services and Activity Codes**

This guide is to provide guidance on services and activity codes. While comprehensive, please recognize that it may not encompass every aspect. It remains the responsibility of the program operator and staff to thoroughly review all relevant policies to ensure proper documentation and allowable expenditures.

All services provided to participants must be recorded in NCWorks using the appropriate Activity Codes. A current, comprehensive list of activity codes and their definitions can be found on the Staff Online Resources page within NCWorks Online.

Activity Dates

Documentation verifying all dates entered must be uploaded to the Documents tab.

* Staff-Assisted Activities—These should be opened and closed on the same day the service is provided.
* Training Activities—These remain open for the duration of the training. Set the projected end date to the estimated date of completion.
	+ Classroom Training:
		- For long-term classroom training, activities should be opened and closed by semester.
		- If the estimated completion date changes, the projected end date must be updated, and supporting documentation must be uploaded.
	+ Work-Based Learning:
		- Work Experience (WEX):
			* Projected Begin, Actual Begin, and Projected End Dates are based on the Work Plan.
			* If the projected end date changes, a plan modification must be uploaded.
			* The Actual End Date is determined by the last day worked on the last time sheet uploaded, which must be marked as final.
		- On-the-Job Training (OJT):
			* Projected Begin, Actual Begin, and Projected End Dates come from the Skills Gap Analysis.
			* The Actual End Date is taken from the final invoice, using the Last Day of Training, and must be marked as final in documents.
* Supportive Services (CSS):
	+ Refer to the Supportive Services Operational Guidance – Rivers East OG 05-2024.
	+ Staff assisted activities should be provided in conjunction with supportive services to ensure meaningful career advising is occurring.

Providers of Activities

* Staff-Assisted Activities: Your employer of record
* Work Experience Activities: Your employer of record
* On-the-Job Training: The employer providing the training
* Classroom Training: The training provider (school, college, etc.)

Completion Codes

* CSS and Staff-Assisted Activities: Use the "Successful" completion code.
* Occupational Skills Training: Refer to Occupational Skills Training Operational Guidance – Rivers East OG 06-2024.
* Work-Based Learning: Refer to Work-Based Learning Operational Guidance – Rivers East OG 07-2024.
* System Closures: A system closure occurs when an activity remains open 15 days beyond the projected end date. These should be avoided, as they reflect reactive rather than proactive case management. System closures often indicate a lapse in timely follow-up. Staff should monitor alerts and take appropriate action to ensure activities are closed in a timely and accurate manner.

Case Notes

All activities must include a case note in the Closure Tab, clearly detailing the service provided.

**Applicable Policies, TEGLs, and other Documents:**

<https://www.commerce.nc.gov/workforce-policy-ps-05-2020-ncworks-online-service-activity-codes-and-definitions-guidance-case>

<http://riverseastwdb.org/wp-content/uploads/PY21PolicyUpdates/Activity-codes-Definitions.pdf>

<http://riverseastwdb.org/wp-content/uploads/2023/06/2021-09-ss.pdf>